



AmpliFund 



Grant Maker Pre-Award Core Series

Application Configuration

Core Series Overview

- **Training 1:** AmpliFund & Illinois System Integrations
- **Training 2:** Pre-Award – Master Data, Fund, Opportunity
-  • **Training 3:** Pre-Award – Application Configuration
- **Training 4:** Pre-Award – Scoring/Reviewer Field Set-up & Application Testing
- **Training 5:** Pre-Award – Application Review Workflow Configuration & Testing

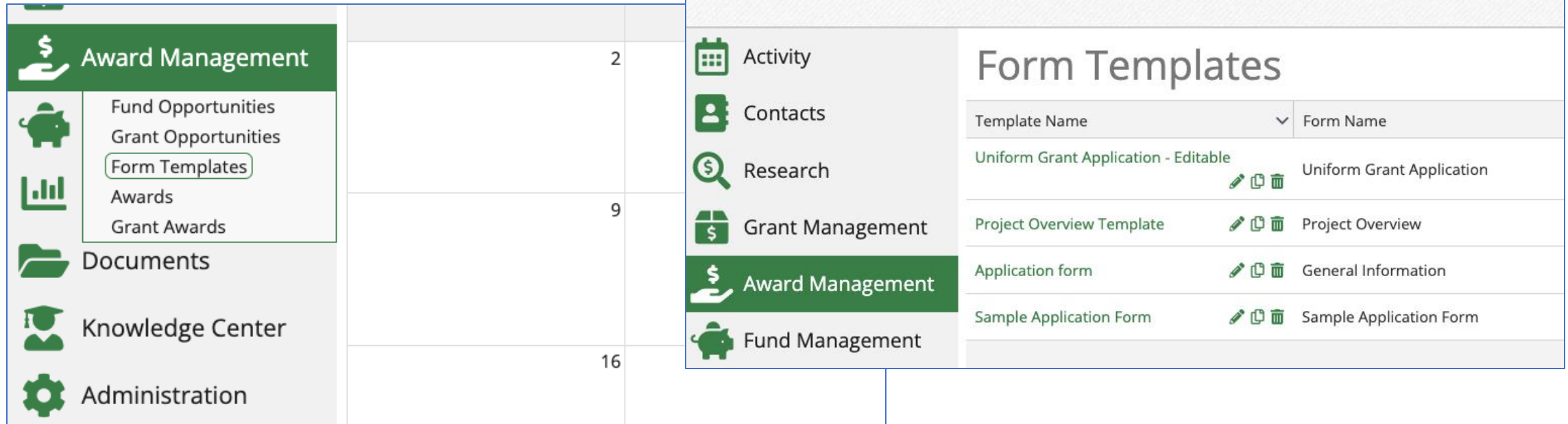
Agenda

- Form Templates
- Application Forms
- Budget Template
- Performance Plan Template
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

Form Templates

Access Form Templates

- Form Templates are a way to create standard and reusable Application Forms.
- Log in to AmpliFund.
- Click on Award Management > Form Templates.
- Land on a list of all Form Templates.

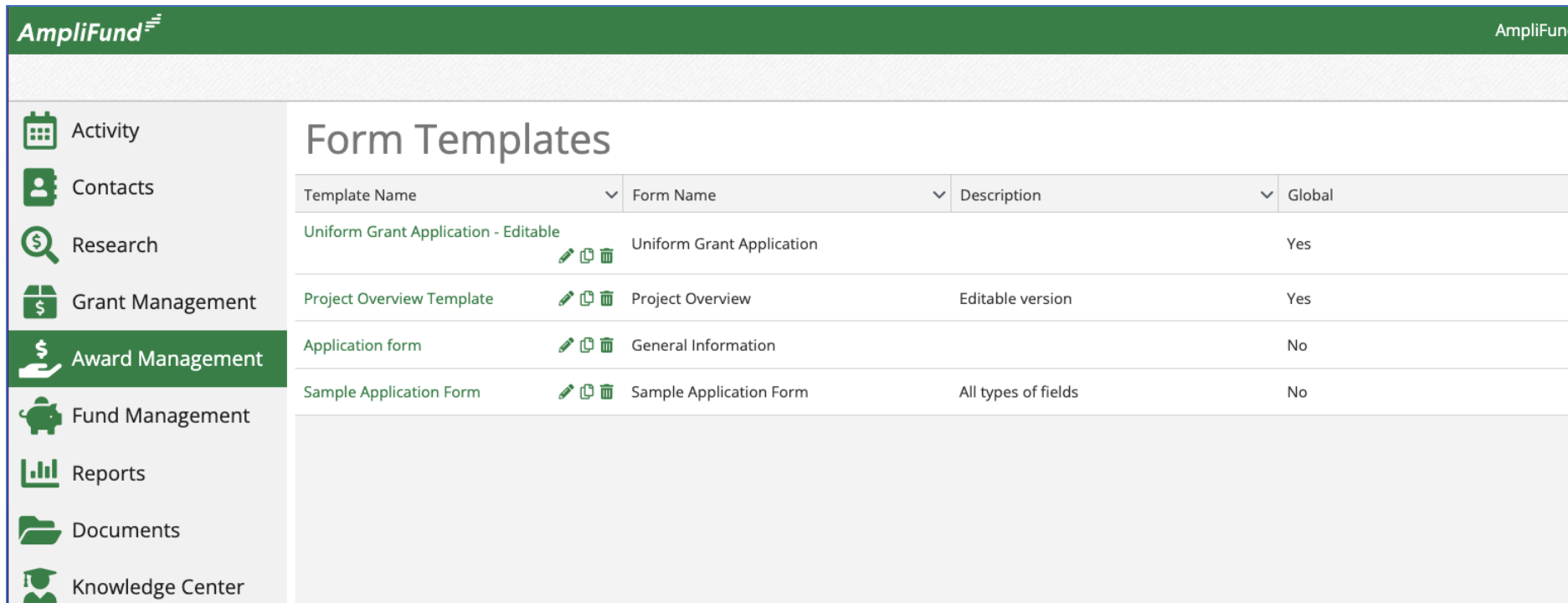


The screenshot displays the AmpliFund user interface. On the left, a navigation sidebar is visible with the following menu items: Award Management (highlighted), Fund Opportunities, Grant Opportunities, Form Templates (highlighted), Awards, Grant Awards, Documents, Knowledge Center, and Administration. The main content area shows a table with three rows of data. The first row has a value of 2, the second 9, and the third 16. On the right, a secondary navigation menu includes Activity, Contacts, Research, Grant Management, Award Management (highlighted), and Fund Management. The 'Form Templates' page is open, showing a table with the following data:

Template Name	Form Name
Uniform Grant Application - Editable	Uniform Grant Application
Project Overview Template	Project Overview
Application form	General Information
Sample Application Form	Sample Application Form

Edit, Copy, Delete Form Templates

- Click on the pencil edit icon to edit the template.
- Click on the paper edit icon to copy the template.
- Click on the trashcan icon to delete the template.

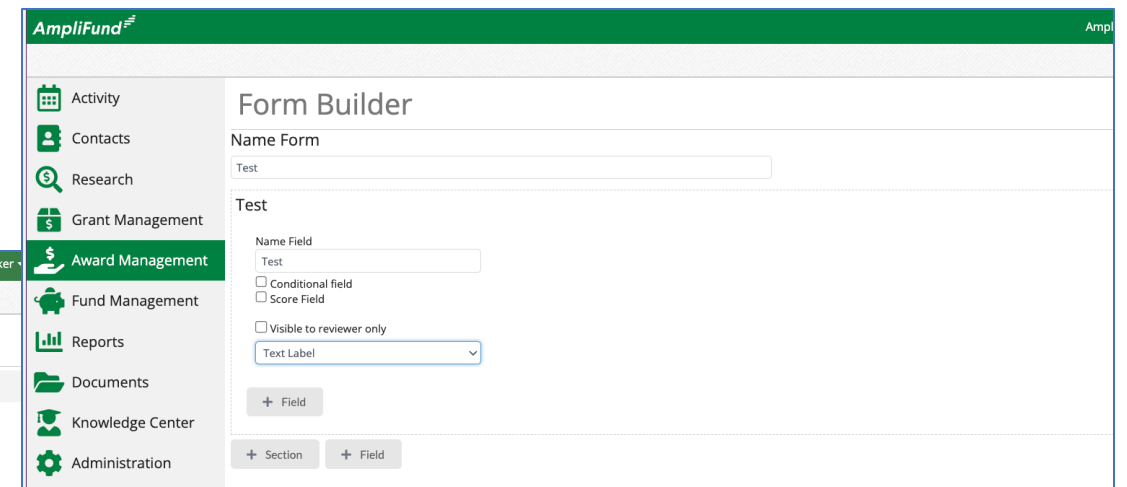
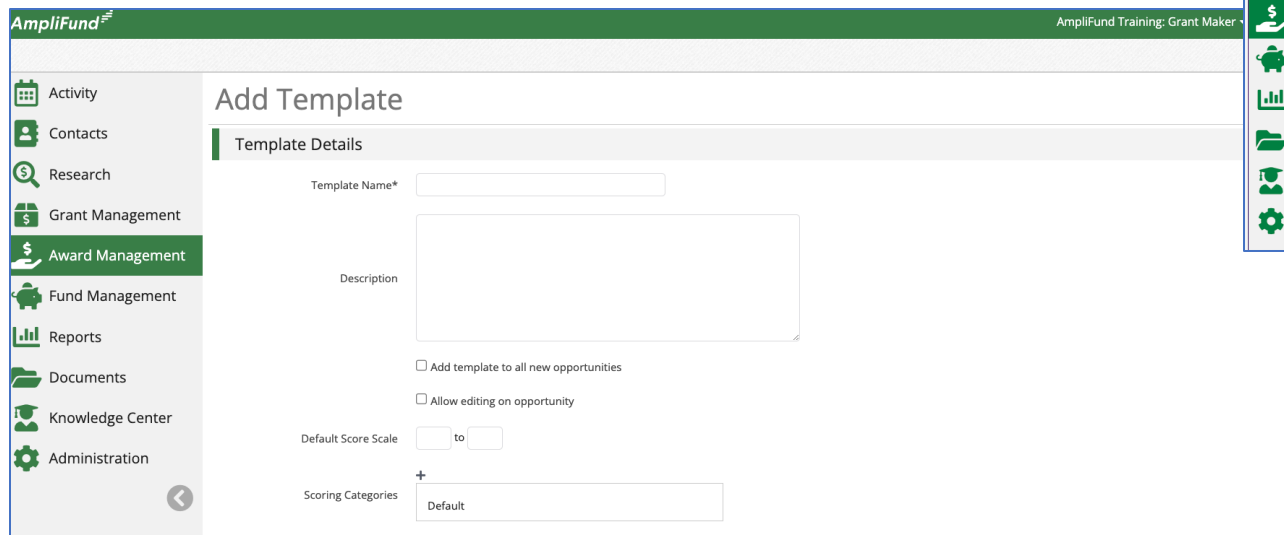


The screenshot shows the AmpliFund web application interface. On the left is a navigation sidebar with icons and labels for Activity, Contacts, Research, Grant Management, Award Management (highlighted in green), Fund Management, Reports, Documents, and Knowledge Center. The main content area is titled "Form Templates" and contains a table with the following data:

Template Name	Form Name	Description	Global
Uniform Grant Application - Editable	Uniform Grant Application		Yes
Project Overview Template	Project Overview	Editable version	Yes
Application form	General Information		No
Sample Application Form	Sample Application Form	All types of fields	No

Create Form Template

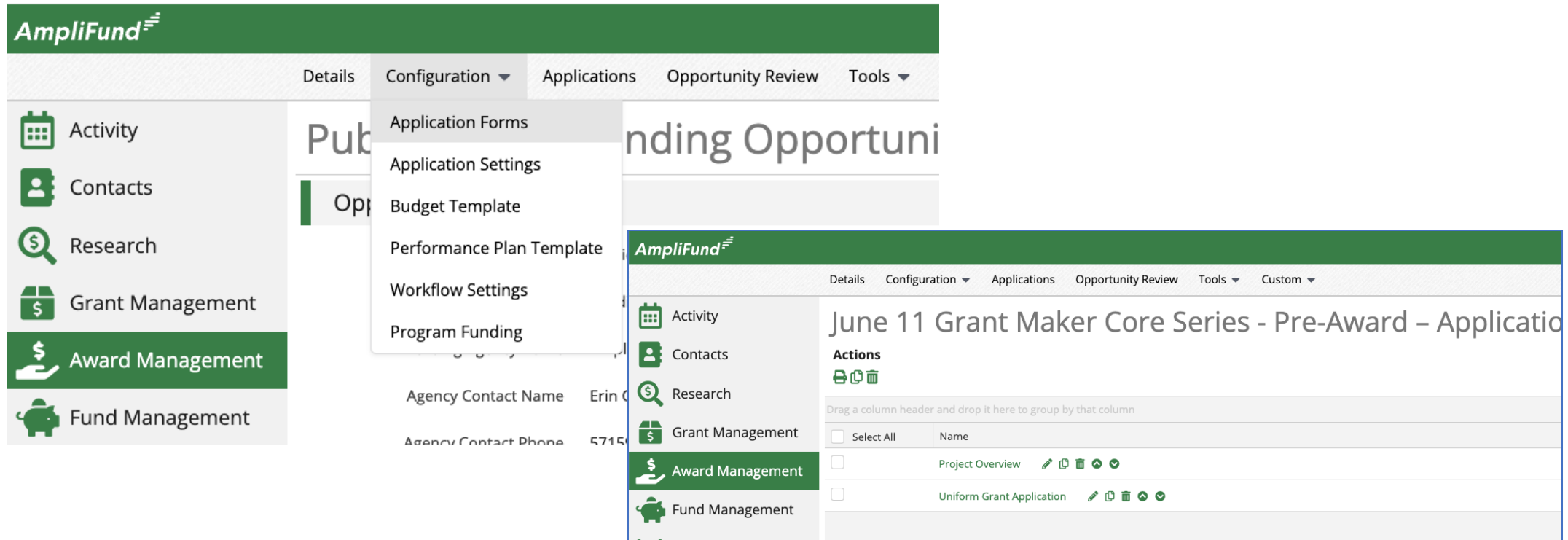
- Click on the + icon on the top right of the screen.
- Configure the Template Details.
- Name Form.
- Add Sections.
- Add Fields.
- Click Create on the bottom right of the screen.



Application Forms

Access Application Forms

- Navigate to the appropriate Opportunity.
- Click on Configuration > Application Forms.
- Land on a list of all Application Forms for that Opportunity.

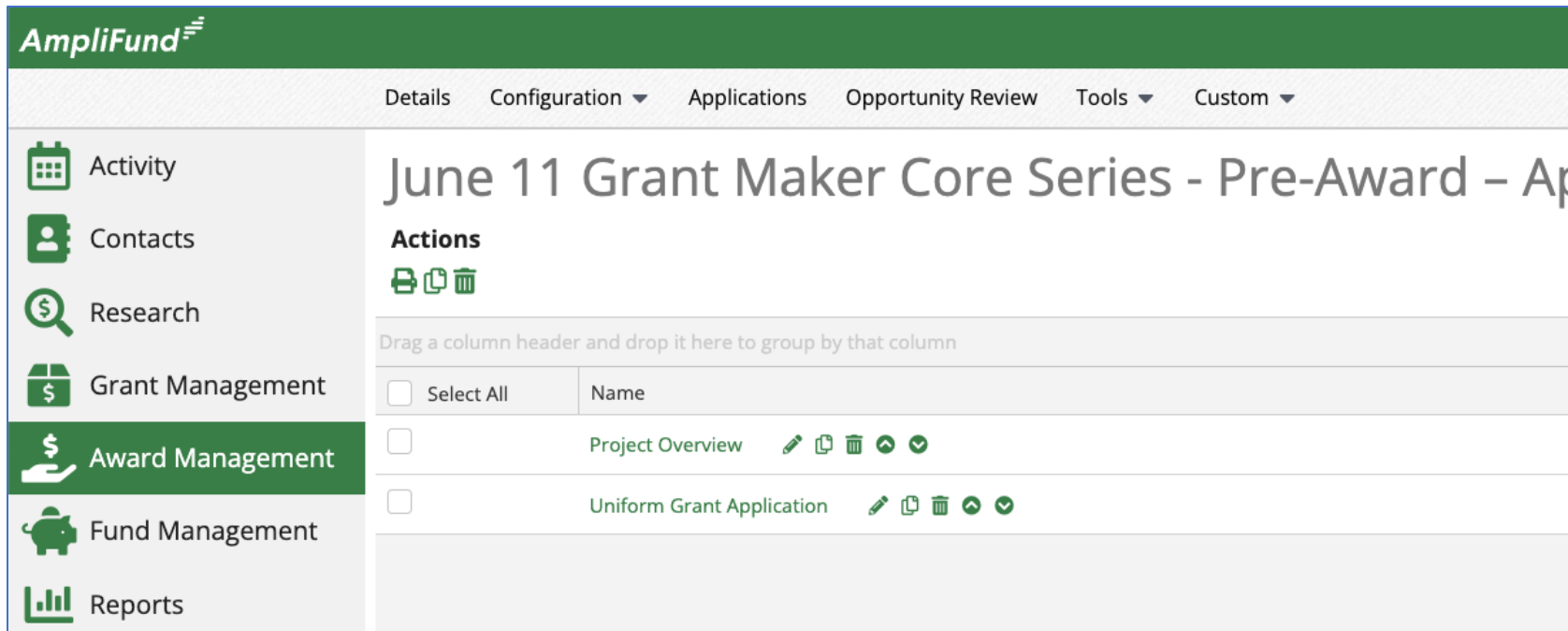


The screenshot displays the AmpliFund web application interface. The top navigation bar includes tabs for Details, Configuration, Applications, Opportunity Review, and Tools. The left sidebar contains a navigation menu with icons and labels for Activity, Contacts, Research, Grant Management, Award Management, and Fund Management. The main content area shows a dropdown menu under Configuration with options: Application Forms, Application Settings, Budget Template, Performance Plan Template, Workflow Settings, and Program Funding. Below this, a table lists Agency Contact Name and Agency Contact Phone. An inset window shows the 'June 11 Grant Maker Core Series - Pre-Award - Application' page, which includes an Actions section with a table of application forms:











Actions	
Drag a column header and drop it here to group by that column	
<input type="checkbox"/> Select All	Name
<input type="checkbox"/>	Project Overview
<input type="checkbox"/>	Uniform Grant Application

Edit, Copy, Delete Application Forms

- Click on the pencil edit icon to edit the template.
- Click on the paper edit icon to copy the template.
- Click on the trashcan icon to delete the template.

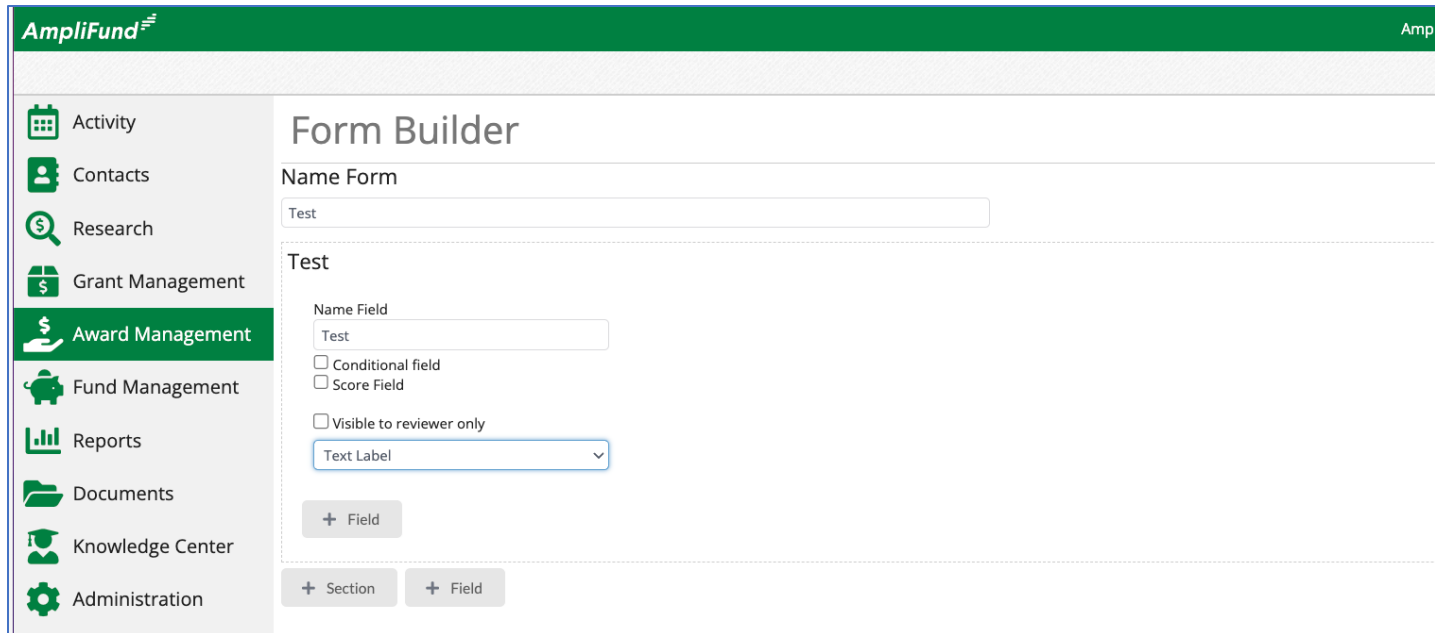


The screenshot displays the AmpliFund web application interface. The top navigation bar includes the AmpliFund logo and menu items: Details, Configuration, Applications, Opportunity Review, Tools, and Custom. A left sidebar contains icons for Activity, Contacts, Research, Grant Management, Award Management (highlighted), Fund Management, and Reports. The main content area shows the title 'June 11 Grant Maker Core Series - Pre-Award - Ap' and an 'Actions' section with icons for print, copy, and delete. Below this is a table with a 'Name' column and a 'Select All' checkbox. The table lists two items: 'Project Overview' and 'Uniform Grant Application', each with a checkbox and a set of action icons (edit, copy, delete, up, down).

<input type="checkbox"/> Select All	Name
<input type="checkbox"/>	Project Overview     
<input type="checkbox"/>	Uniform Grant Application     

Add New Application Form

- Click on the + icon on the top right of the screen.
- Enter the Name.
- Add Sections.
- Add Fields.



The screenshot shows the AmpliFund Form Builder interface. On the left is a navigation menu with icons and labels for Activity, Contacts, Research, Grant Management, Award Management (highlighted), Fund Management, Reports, Documents, Knowledge Center, and Administration. The main area is titled "Form Builder" and shows a "Name Form" with a text input field containing "Test". Below this is a "Test" section with a "Name Field" input field containing "Test", and checkboxes for "Conditional field", "Score Field", and "Visible to reviewer only". A dropdown menu is set to "Text Label". At the bottom of the form builder area are buttons for "+ Field", "+ Section", and "+ Field". The AmpliFund logo is in the top left corner of the interface, and "Ampl" is visible in the top right corner.

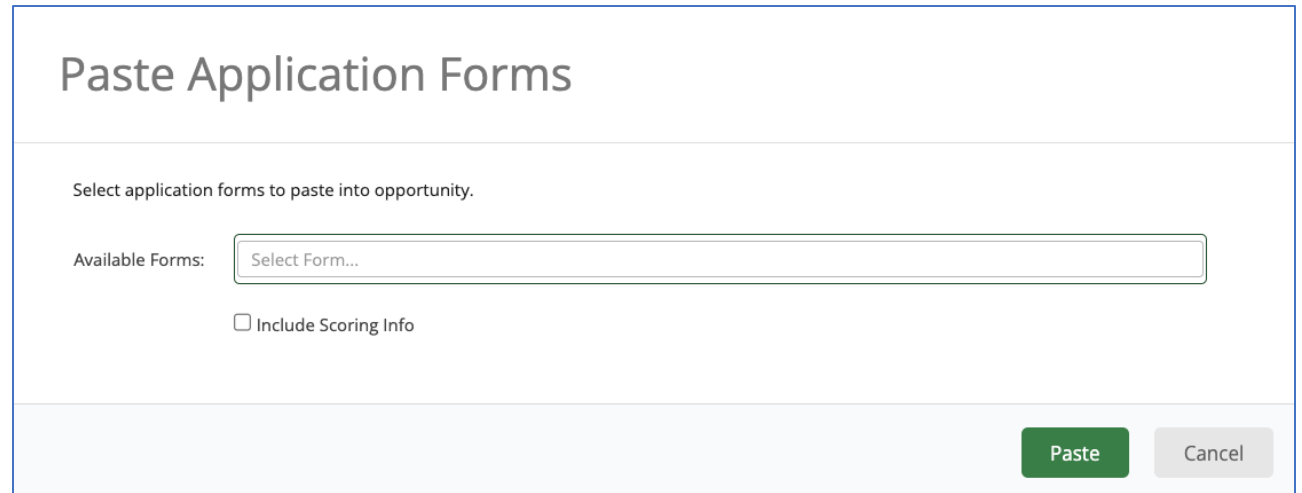
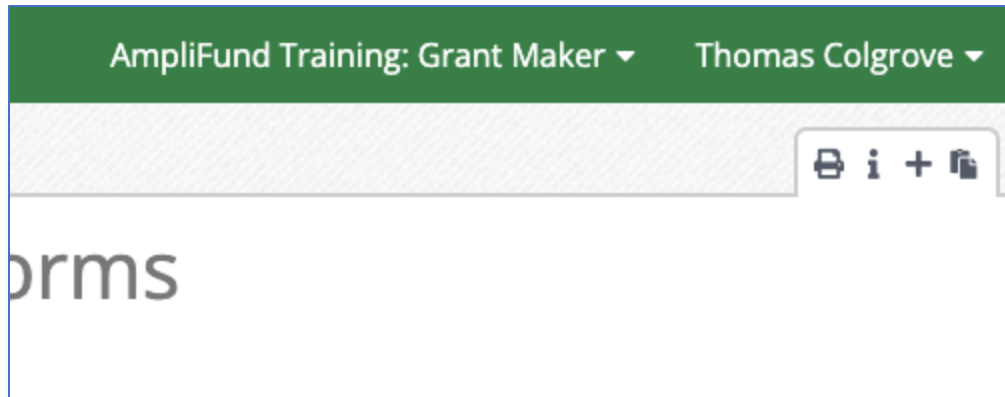
Field Types

- Content – Data funders provide applicants.
- Entry – Data applicants provide funders.

The screenshot displays the AmpliFund interface. On the left is a navigation menu with the following items: Grant Management, Award Management (highlighted), Fund Management, Reports, Documents, Knowledge Center, and Administration. The main area is titled 'Test' and contains a 'Name Field' with the value 'Test'. Below the name field are two checkboxes: 'Conditional field' and 'Score Field'. A dropdown menu is open, showing two categories: 'Content' and 'Entry'. Under 'Content', 'Text Label' is selected with a checkmark. Other options under 'Content' include Description Text, External Link, and Attachment. Under 'Entry', options include Single Line Text Field, Multi Line Text Box, Multiple Choice, Multiple Selection - Checkboxes, Dropdown List, File Upload, Date, Numeric Field, and Table.

Paste Form Templates and Application Forms

- Click on the paste icon on the top right of the screen to add Form Template or Application Forms from your account.
- Select the Form.
- Include scoring information if needed.
- Click Paste on the bottom right of the screen.

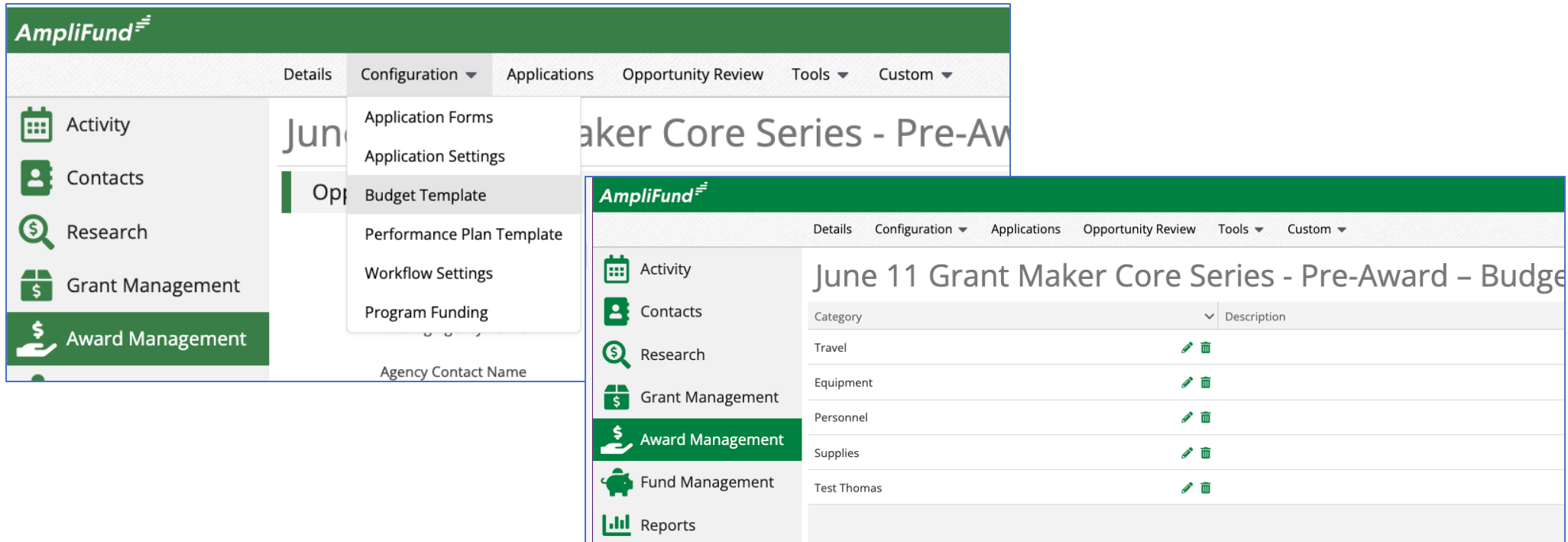


The screenshot shows the "Paste Application Forms" dialog box. The title is "Paste Application Forms". Below the title, there is a text prompt: "Select application forms to paste into opportunity." Underneath, there is a section labeled "Available Forms:" followed by a dropdown menu with the text "Select Form...". Below the dropdown, there is a checkbox labeled "Include Scoring Info". At the bottom right of the dialog, there are two buttons: "Paste" (green) and "Cancel" (grey).

Budget Template

Access Budget Template

- Navigate to the appropriate Opportunity.
- Click on Configuration > Budget Template.
- Land on the Budget Template.

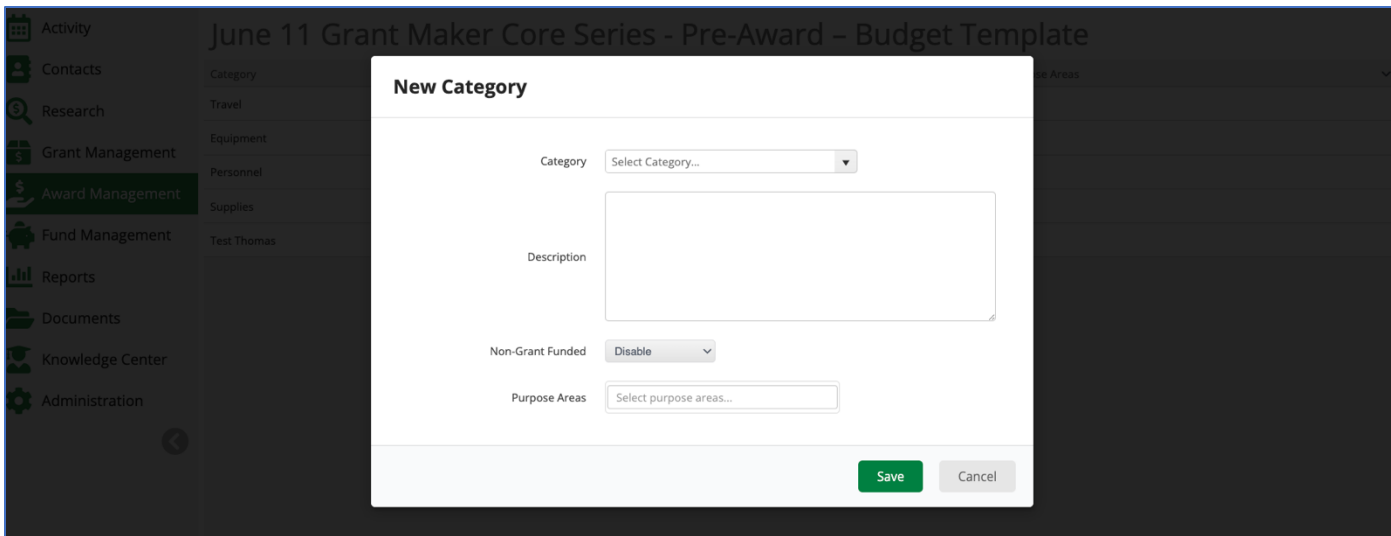


The screenshot shows the AmpliFund web application interface. The top navigation bar includes tabs for Details, Configuration, Applications, Opportunity Review, Tools, and Custom. The left sidebar contains icons for Activity, Contacts, Research, Grant Management, and Award Management. The main content area displays the title "June 11 Grant Maker Core Series - Pre-Award" and a dropdown menu under "Configuration" with options: Application Forms, Application Settings, Budget Template, Performance Plan Template, Workflow Settings, and Program Funding. The "Budget Template" option is selected, leading to a page titled "June 11 Grant Maker Core Series - Pre-Award - Budget". This page features a table with columns for Category and Description, listing items like Travel, Equipment, Personnel, Supplies, and Test Thomas, each with edit and delete icons.

Category	Description
Travel	
Equipment	
Personnel	
Supplies	
Test Thomas	

Add Budget Categories to the Budget Template

- Click on the + icon on the top right of the screen.
- Select the Category.
- Enter the Description (Optional).
- Configure the Non-Grant Funded option.
- Add Purpose Areas (Optional).
- Click Save on the bottom right of the screen.

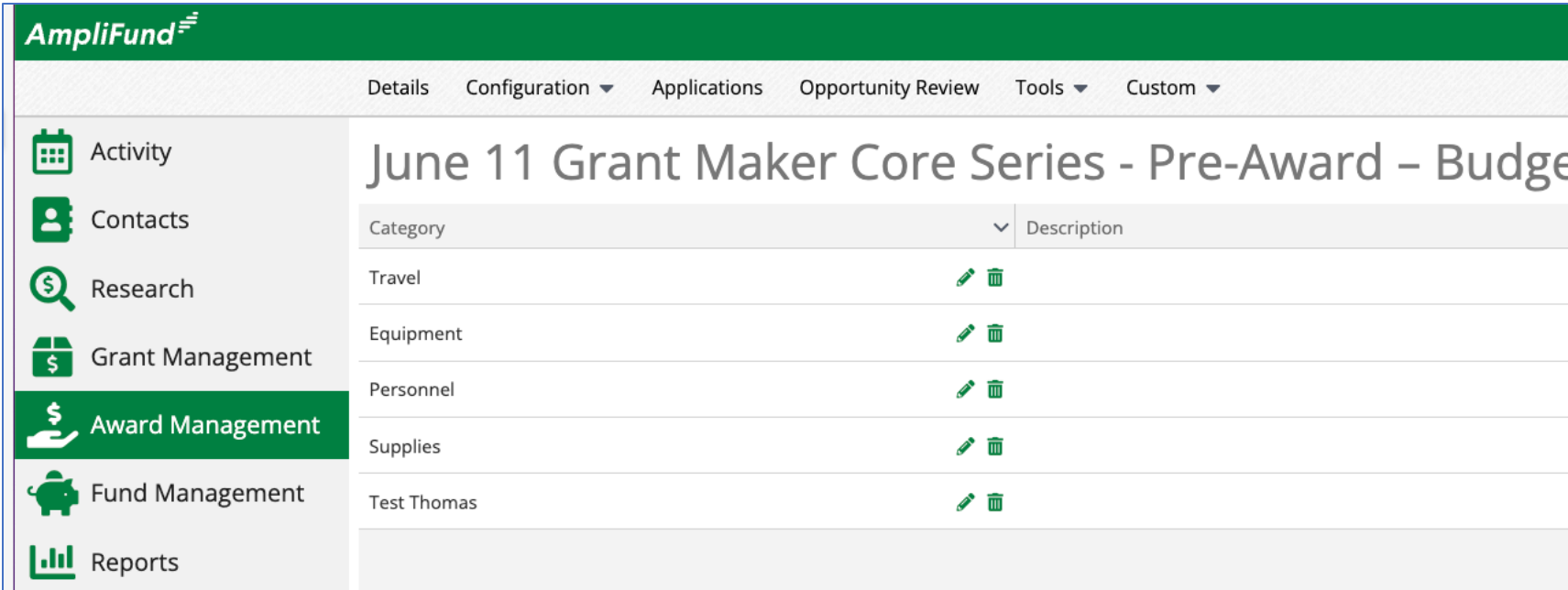


The screenshot displays the AmpliFund software interface. On the left is a dark sidebar with navigation icons and labels: Activity, Contacts, Research, Grant Management, Award Management (highlighted), Fund Management, Reports, Documents, Knowledge Center, and Administration. The main content area has a header 'June 11 Grant Maker Core Series - Pre-Award - Budget Template' and a list of categories: Category, Travel, Equipment, Personnel, Supplies, and Test Thomas. A 'New Category' dialog box is open in the center, containing the following fields and controls:

- Category:** A dropdown menu with the text 'Select Category...'.
- Description:** A large, empty text input area.
- Non-Grant Funded:** A dropdown menu with the text 'Disable'.
- Purpose Areas:** A text input field with the placeholder text 'Select purpose areas...'.
- Buttons:** A green 'Save' button and a grey 'Cancel' button at the bottom right of the dialog.

Edit, Delete Budget Categories

- Click on the pencil edit icon to edit the Category.
- Click on the trashcan icon to delete the Category.



The screenshot displays the AmpliFund web application interface. The top navigation bar includes the AmpliFund logo and menu items: Details, Configuration, Applications, Opportunity Review, Tools, and Custom. A sidebar on the left contains icons and labels for Activity, Contacts, Research, Grant Management, Award Management (highlighted in green), Fund Management, and Reports. The main content area shows a title "June 11 Grant Maker Core Series - Pre-Award - Budget" and a table with two columns: Category and Description. The table lists five categories: Travel, Equipment, Personnel, Supplies, and Test Thomas, each with a pencil icon for editing and a trash can icon for deletion.

Category	Description
Travel	
Equipment	
Personnel	
Supplies	
Test Thomas	

Performance Plan Template

Access Performance Plan Template

- Navigate to the appropriate Opportunity.
- Click on Configuration > Performance Plan Template.
- Land on the Performance Plan Template.

The image displays two screenshots of the AmpliFund web application interface. The top screenshot shows the 'Configuration' dropdown menu open, with 'Performance Plan Template' highlighted. The bottom screenshot shows the 'Performance Plan Template' page for the opportunity 'June 11 Grant Maker Core Series - Pre-Awar'.

AmpliFund

Details Configuration Applications Opportunity Review Tools Custom

Activity
Contacts
Research
Grant Management
Award Management

Application Forms
Application Settings
Budget Template
Performance Plan Template
Workflow Settings
Program Funding

AmpliFund

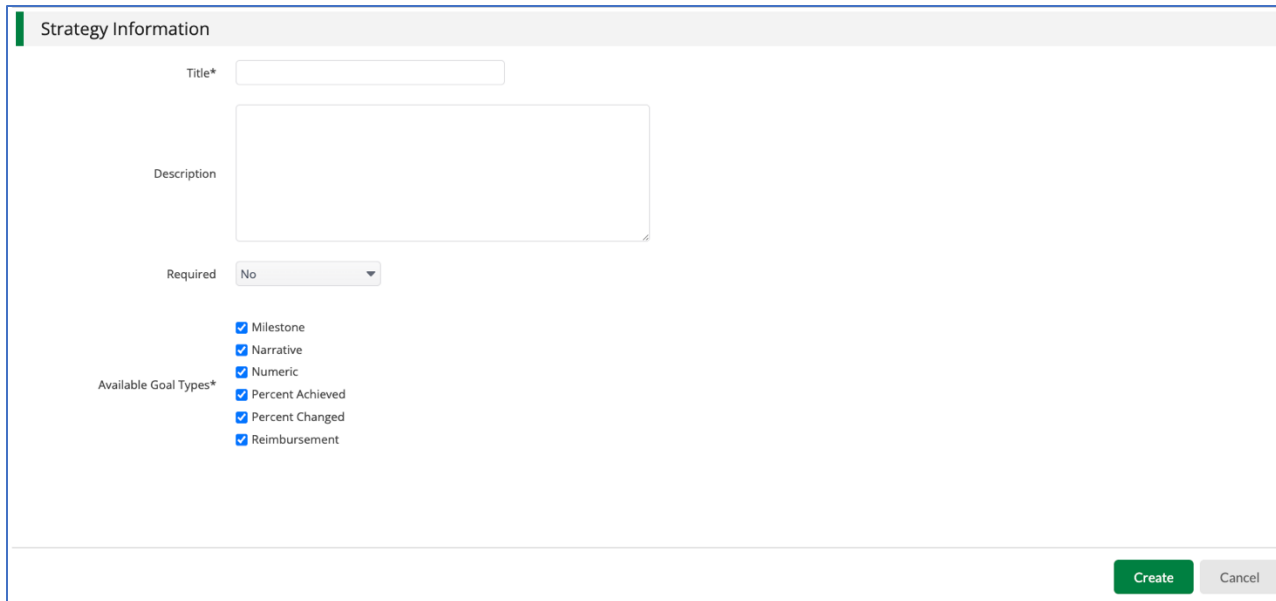
Details Configuration Applications Opportunity Review Tools Custom

June 11 Grant Maker Core Series - Pre-Awar

Title	Description
Test Goal	Test...

Add Performance Plan Goal

- Click the + icon on the top right of the screen.
- Enter the Title.
- Enter the Description (Optional).
- Select the Required option.
- Configure Allowable Goal Types.
- Click Create on the bottom right of the screen.



The screenshot shows a form titled "Strategy Information" with the following fields and options:

- Title***: A text input field.
- Description**: A larger text area for optional details.
- Required**: A dropdown menu currently set to "No".
- Available Goal Types***: A list of checkboxes, all of which are checked:
 - Milestone
 - Narrative
 - Numeric
 - Percent Achieved
 - Percent Changed
 - Reimbursement

At the bottom right of the form, there are two buttons: a green "Create" button and a grey "Cancel" button.

Performance Plan Goal Types

Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	“Number of program participants” with a goal target of 50.

Performance Plan Goal Types

Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Volunteer Retention Rate” with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Decrease in Student Absences” with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	“Number of Patient Screenings” with target/maximum units of 100, and a reimbursement rate per unit of \$22.

In-Product Demo

Next Steps

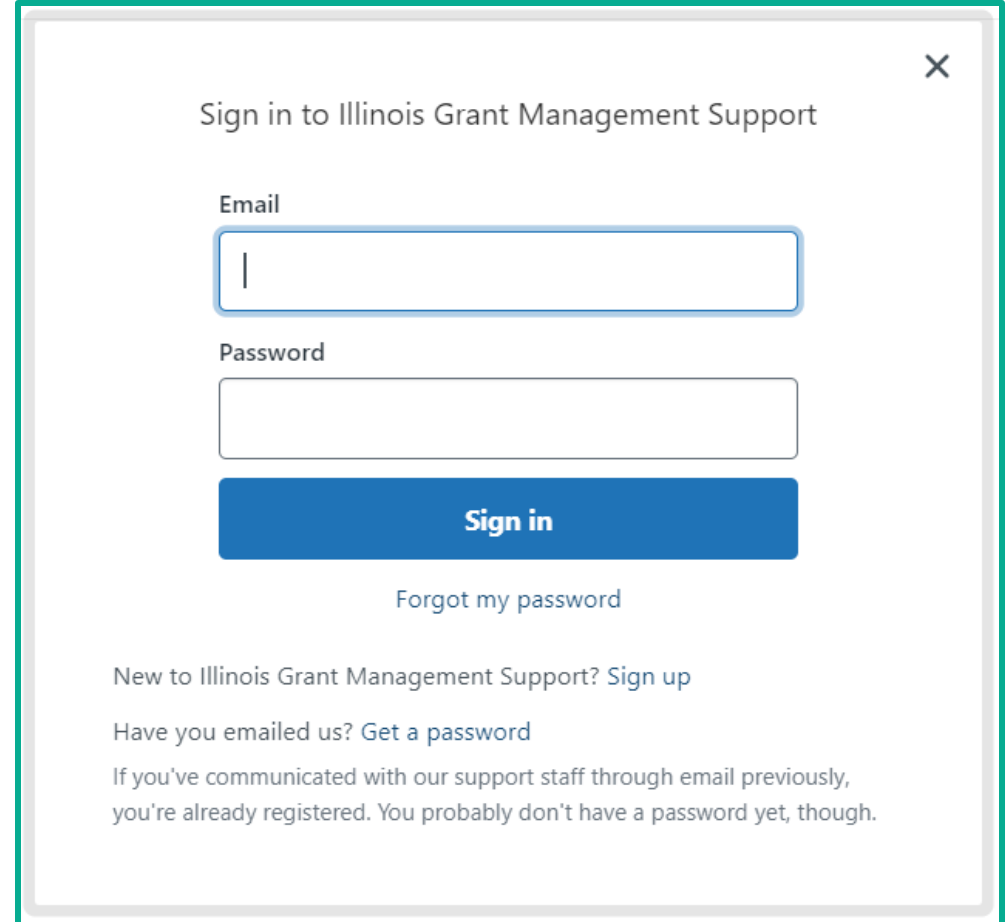
Next Steps

- Create a Form Template.
- Create an Application Form.
- Add a Budget Category to the Budget Template.
- Add a Performance Goal to the Performance Plan Template.
- Prepare review and scoring for the next session.

Customer Support

Create AmpliFund Support Account

1. Access the appropriate support site.
2. Click the **Sign up** link.
3. Enter your **full name**.
4. Enter your **email address**.
5. Complete the **I'm not a robot** check.
6. Click the **Sign up** button.
7. An email from support@zendesk.com will be sent to you via email.
8. Click the link to set your password.



Sign in to Illinois Grant Management Support

Email

Password

Sign in

[Forgot my password](#)

New to Illinois Grant Management Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

AmpliFund Illinois Support Portal

Submit a support ticket:

Commercial - support@amplifund.zendesk.com.

Illinois - support@il-amplifund.zendesk.com.

Nebraska - support@ne-amplifund.zendesk.com.

Visit Support Portal:

Commercial - <https://amplifund.zendesk.com>.

Illinois - <https://il-amplifund.zendesk.com>.

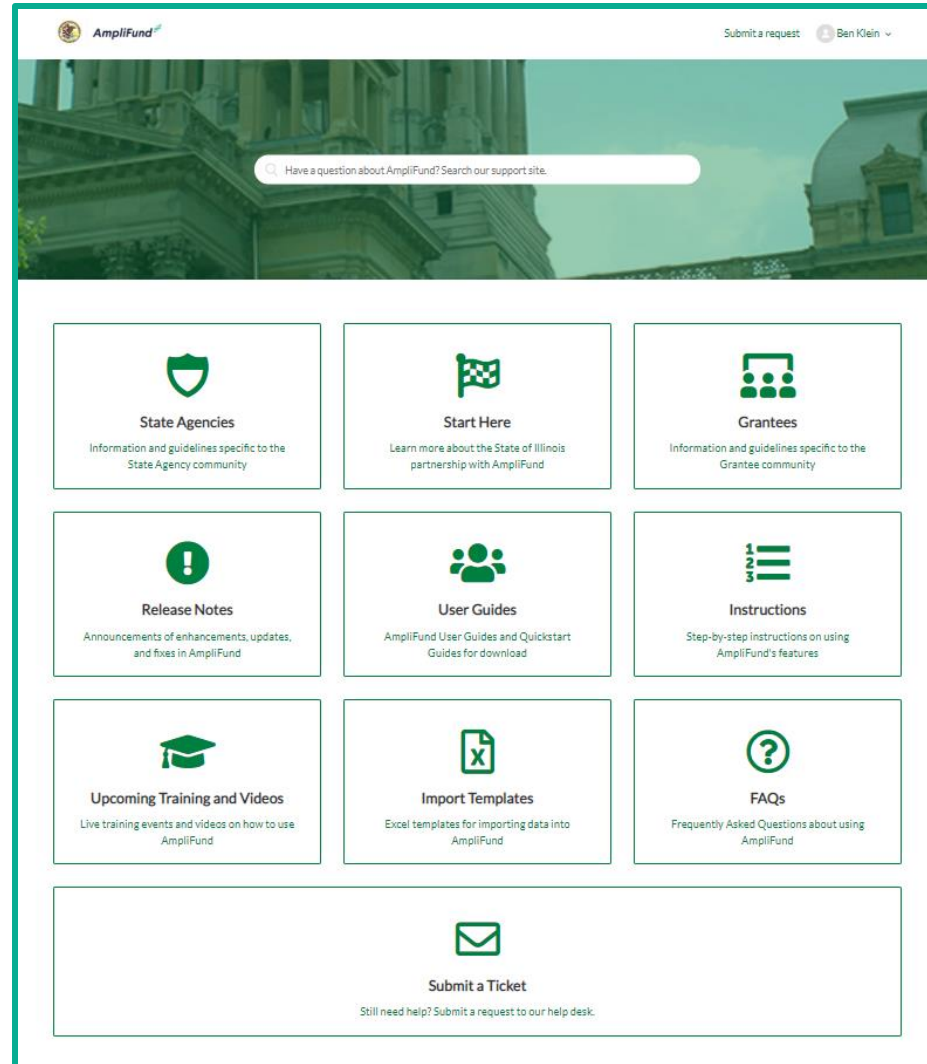
Nebraska - <https://ne-amplifund.zendesk.com>.

Production Site:

Commercial - <https://www.gotomygrants.com>.

Illinois - <https://il.amplifund.com>.

Nebraska - <https://ne.amplifund.com>.



Question & Answer